



SOUTH CAROLINA STATE DEPARTMENT OF EDUCATION

PowerSchool End of Year Process Manual for SC Users

2016

Audience: The intended audience for PowerSchool End of Year Processing procedures includes district staff responsible for verifying, correcting, and assuring accuracy of PS field data.

Additional Information:

The PowerSchool End of Year Process is used to close out the current school year and transfer all students to the grade level and school that each will attend during the upcoming school year. Note the additional step in the Post-End of Year tasks, import the new 10-point UGP Grade Scale, that must be performed before the start of the 2016-2017 school year. Information about this important task will be released in a separate document.

For additional information, contact PowerSchool Support or the South Carolina Department of Education (SCDE) District Technology Services office.

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Introduction

The PowerSchool End of Year Process is used to close out the current school year and transfer all students to the grade level and school that each will attend during the upcoming school year.

Specifically, the End of Year (EOY) Process:

- Sets each student's Exit Date to the last day of the school year.
- Sets the Next Grade for the following year.
- Sets the Next School for the following year.
- Carries forward lunch balances and clears all lunch records.
- Removes all parental access records.

In addition to transferring students to their next school enrollment, the End of Year Process also does the following:

The field values for the following tables are cleared:

- Batches – PowerLunch serving sessions
- BulletinItems – Daily bulletin records
- DBLog – Tracks various changes made in Direct Database Access (DDA)
- GLDetail – PowerLunch meal transactions and deposits
- Logins – PowerSchool login sessions
- PhoneLog – Guardian web access sessions
- Lunch balances are transferred from one year to the next.
- Fee balances can be cleared or transferred from one year to the next.

Yearly Process Summary

EOY does much more than move students ahead and change their next year values. It transfers students to the next school and year, and it sets their exit date as the last date of that year. For this reason, it requires that years and terms are set up for all schools, and that there is a default FTE for all grade levels. Remember that EOY processes data at the district level, so all students and all schools must be set up correctly.

When EOY moves students ahead, it is enrolling them in the school for the new year, and enrolling them in the courses in your committed schedule (if you have committed your schedule using PowerScheduler). Therefore, it changes the entry and exit dates for the student to those the school has set for the next year. It also assesses any school or course enrollment fees to the student when it makes those enrollments.

In addition, it carries forward the past year's lunch and fee balances, while deleting records of individual transactions and parent access records. Activities are carried forward, so if you don't want students to be assigned to the same activities automatically, you should clear that data prior to running EOY.

There are a number of preparatory steps you should take prior to running EOY. These include validation of school enrollments and section enrollments, verification of years and terms, and default FTEs for grade levels. It is also good practice to check for duplicate students.

You should take some precautionary steps before you run EOY. These steps include making sure you have backups, running any reports that might be more difficult to access after you close out the year, and exporting historical grades.

Finally, you should close out all of this year's business before running EOY. This includes storing grades for the final term and committing your schedule (if you are using PowerScheduler). If you are running summer school, you must wait until the end of that extra term to run EOY.

Guide Overview

The PowerSchool End of Year Process Guide describes how to prepare for and run the PowerSchool End of Year Process, as well as several common tasks that must take place upon completing the PowerSchool End of Year Process. This guide is divided into the following sections:

- Preparing for the End of Year Process
- Performing the End of Year Process
- After the End of Year Process
- Appendix

Preparing for the End of Year Process

Before running the PowerSchool End of Year Process, several steps are necessary to prepare your PowerSchool database to close out the school year. The steps described should be completed in the order listed in the following checklist. This process usually begins after completing the final term of the school year.

End of Year Preparation Checklist

Before beginning, make sure to permanently store grades and standards, and perform an initial backup of your PowerSchool data file. Throughout the EOY process, you should make multiple backups of the data and APPLICATION files as you modify any incorrect data.

Make a copy of the entire PowerSchool folder on your server in case you need to restore the application to the exact state it was in prior to making any changes to your data or performing the EOY process.

PowerSchool strongly recommends that you create a document to independently track changes as they are made to your data. Include all changes and indicate when backups are made so that if you are required to revert to a backup file, you will know which changes were in effect at the time each backup was made.

TRANSCRIPTS & CLASS RANK – Best Practice

It is STRONGLY RECOMMENDED that you “print” your transcripts to PDF and save them to your local computer and/or a CD, USB, etc. Once your seniors are moved to “Graduated Students” class rank can no longer be accurately calculated.

Print your senior transcripts as early as possible, save them. Then print transcripts for your other grade levels and save as well.

End of Year Preparation Checklist

Use the following checklist to track your progress through the End of Year Preparation phase.

- ☐ Store Grades for the Current Year
- ☐ Validate School Enrollments
- ☐ Validate Section Enrollments
- ☐ Print Reports
- ☐ Backup PowerSchool
- ☐ Create Years and Terms (**required**)
- ☐ Assign Next School Indicators (**required**)
- ☐ Assign Next Year Grade Values (**required**)
- ☐ Clear Activities
- ☐ Configure Default Grade Level for FTEs (**required**)
- ☐ Configure Fees
- ☐ Complete Scheduling and Commit Schedules
- ☐ Print Meal Transactions and PowerLunch Reports
- ☐ Print Extract State Reporting Information
- ☐ Export Historical Grades

Check for Duplicate Student Records

Run Quick Export at the District Level to check for duplicate student records.

- Lastfirst
- Student_number
- Grade_level
- Schoolname
- DOB
- Street

You may sort in Excel by Schoolname, Lastfirst and have each school identify duplicate student records.

For any duplicate students, have each school find which record has the most complete information for attendance, schedules, demographics, etc., populate any missing values in the most complete student record and verify all data values have been accurately entered. Then use DDA to delete the least complete duplicate

Validate School Enrollment Dates

Run the School Enrollment Audit report.

1. Log into PowerSchool.
2. Navigate to [Start Page > System Reports > School Enrollment Audit](#) to run the report. The Possible Conflicts page appears.
3. Review the possible school enrollment conflicts and make any necessary corrections.

Note: School enrollment conflicts occur when the entry or exit date for one school enrollment overlaps the dates for another school enrollment, or extend beyond a valid set of scheduling terms (Years and Terms). To verify school enrollment dates, review current and previous enrollments on the Transfer Info student page. Current school enrollments are stored in the [Students] table and previous school enrollments are stored in the [ReEnrollments] table.

Validate Section Enrollment Dates

Validate section enrollment dates by running the Section Enrollment Audit report.

1. Log into PowerSchool.
2. Navigate to [Start Page > System Reports > Section Enrollment Audit](#) to run the report. The Possible Conflicts page appears.
3. Review the possible section enrollment conflicts and make any necessary corrections.

Note: Section enrollment conflicts occur if a student's section enrollment dates do not fall within the entry and exit dates for a valid school enrollment or within the first and last day of a valid scheduling term (Years and Terms). Conflicts also occur if a student is enrolled in a school, but not enrolled in any classes. To review section enrollment dates, select the All Enrollments or Modify Info page for a student. Section enrollments are stored in the [CC] table.

If your school uses PowerScheduler and you have already committed your schedule, you may see numerous "No school enrollment found" error messages when running the Section Enrollment Audit. These errors may be ignored.

Run Additional Data Validation Reports

Run the data validation reports under **System > Special Operations**. Choose Data Validation Reports. This path takes you to a list of reports you can run which identify errors in the tightly linked set of tables that are used to make student schedules. These are also the reports you run to identify problems leading to syncing errors in the database. Also, you may not be able to run Enrollment by Grade or Enrollment by Section reports while these errors persist.

Print Reports

- ▶ ***WHY Print Reports?? After EOY process, it is difficult to extract some historical data using certain reports.***

Print any reports you might need, such as report cards, transcripts, and form letters. For example, print copies or save PDF files of your school's transcripts for this year's graduates.

While many reports in PowerSchool can return data from prior years, some reports are designed to report on data from the *current school year only*. After running the End of Year Process, it may be difficult to extract some historical data using certain reports. It is recommended to print and archive several reports for the current school year before running the End of Year Process:

- **User Defined Reports:**

- Object Reports
- Report Cards
- Form Letters

- **State Reports ***Important:***

These State Reports should be submitted, run, and printed for both 45 day and

135 day prior to running End of Year Processing:

1. Membership and Attendance Report & Worksheet(s)
2. Master Classification List (Alphabetically by Grade)
3. Cumulative Class Report & List(s)
4. District Summary Report for Membership and Attendance
5. Add-on Weightings Report(s)
6. Add-on Weightings List(s)

For additional information about retention of data for audit requirements, refer to the Pupil Accounting Manual located on the SCDE web site at

<http://ed.sc.gov/finance/financial-services/manuals-handbooks-and-guidelines/pupil-accounting-manual/pupil-accounting-manual>

- **Global Reports** (i.e. reports listed on the Run Reports page, found by navigating to [Start Page > Reports > Run Reports](#), including Attendance Summary by Grade, Period Att. Verification, and Meal Count Report)

Backup PowerSchool

This step is highly recommended.

Backup and archive your PowerSchool database. Preparation for the End of Year Process may involve modifying many records in the PowerSchool database. Mistakes may be undone by reverting to a database backup.

Archive this backup in a safe location and label the backup as “prior to” End of Year preparation and processing.

Resource: [Oracle Backup and Restore Guide](#)

Years and Terms

This step is required. The End of Year process will NOT run if this has not been completed.

Create the upcoming year term at each school, even if the years and terms have already been created in PowerScheduler. When running the End of Year Process, PowerSchool uses the start and end dates of the upcoming school year to determine a student's new entry and exit date.

Note: When a user creates a new year term on the live side at an existing school,

PowerSchool copies attendance setup information from the previous school year into the new school year. This eliminates the need to recreate attendance codes, attendance code categories, attendance conversions, FTEs, and more. The school calendar is also generated when a year term is created.

Use the following steps to set up Years and Terms for each school:

1. Log into PowerSchool.
2. Click **School** at the top of the page. The Change Schools page appears.
3. Select the appropriate school from the list. The school Start page appears.
4. Navigate to [Start Page > School Setup > Years & Terms](#).
5. Click **New** to create a new school year at the selected school.
6. Enter the name of the new school year, such as 2016-2017.
7. Enter an abbreviation, such as 16-17.
8. Enter the date of the first day of your school year.
9. Enter the date of the last day of your school year.
10. Click **Submit** to finish creating the new school year.
11. Repeat steps 2 through 9 for each school in your district that will be in session during the upcoming school year.

Upon creating a new school year, PowerSchool performs the following additional functions:

Attendance Setup items are copied to the new school year from the previous school year including:

- Attendance Codes
- Attendance Code Categories
- Attendance Preferences
- Attendance Conversions
- Bell Schedules
- Full Time Equivalencies (FTEs)
- Calendar Day records are created for the new school year.

Next School Indicator

This step is required.

The End of Year Process uses the value in the Next School Indicator field for each student to determine which school the student will attend in the upcoming school year. Set each student's Next School Indicator either individually on the Scheduling Setup student screen, or en masse by updating the Next_School field with an import, using the Student Field Value group function, or using DDA.

Note - pre-registered students must have their next school indicator field set as well.

Next Year Grade

This step is required.

The End of Year Process uses the value in the Next Year Grade field for each student to determine which grade level a student will be enrolled in for the upcoming school year. Set each student's Next Year Grade before running the End of Year Process. This can be done individually on the Scheduling Setup student screen, or in groups by updating the Sched_NextYearGrade field with an import, using the Student Field Value group function, or using DDA.

Students in the highest grade level will automatically have their next grade level set to 99. PowerSchool uses this number to indicate that these students are finished with school and should be moved to the Graduated Students School.

Note - Pre-registered students must have their next grade field set as well.

Clear Activities

All student activities and many are automatically carried over during the End of Year Process. Clear any student activities and non-essential fields that shouldn't carry over into the next school year.

This task can be accomplished for groups of students using the Clear Activities function, located by navigating to:

Start Page > System Administrator > Clear Activities

Default Grade Level for FTEs

This step is required.

Verify that each grade level has a default FTE for the upcoming school year. If a student transfers into a grade level that is not assigned a default FTE, the student is not assigned an FTE for the upcoming school enrollment. To access the FTEs for the upcoming school year, select the upcoming school year from the Term menu then navigate to **Start Page > School Setup > Full-Time Equivalencies (FTE)**.

1. Log into PowerSchool.
2. Click **School** at the top of the page. The Change Schools page appears.
3. Select the appropriate school from the list. The school Start page appears.
4. Click **Term** at the top of the page. The Change Term page appears.
5. Select the upcoming school year from the list. For example, if you are closing out the 2015-2016 school year and the 2016-2017 school year is the upcoming

school year, select 2016-2017.

6. Navigate to Start Page > School Setup > Full Time Equivalencies.
7. Select an existing FTE. The FTEs displayed on this page were copied over from the previous school year when the new year term was created.
8. Check the appropriate boxes near the bottom of the FTE to designate that FTE for the desired grade levels. Please note that only one FTE can be the default for a given grade level.
9. Click **Submit**.
10. Repeat for each school that will be in session for the upcoming school year.

Fees

Configure school and course enrollment fees. Both school and course enrollment fees may be assessed individually or en masse after enrollment in a school or course.

****Take special note of the following suggested procedures.***

****** SC Specific End of Year Considerations**

Exit Students from Special Program Enrollments

SC Special Program enrollment entries should be closed out at the end of each school year. Enter the last day of school in the Exit Date field if the student has not exited the program during that school year. Without an exit date, students will continue to appear active in the program and show up on PowerSchool lists. Districts/Schools will definitely want to enter exit dates to ensure PowerSchool program lists reflect accurate enrollment.

Instructions for populating exit dates and exit code for programs:

1. To close a **single student's program**:
Start Page > Special Functions > Special Programs.

New Special Program Enrollment

Wishert, Kelly 12 640341001308 THS State ID: Entry Date: 05/25/2016 Homeroom:

Comment	<input type="text"/>
Entry Date	9/5/2016 <input type="button" value="Calendar"/>
Exit Date	MM/DD/YYYY <input type="button" value="Calendar"/>
Exit Reason	<input type="text"/>
Grade Level	12
Program	ESOL04-ESOL Svc >3 but <4 Years <input type="button" value="v"/>

- To close a group of student's programs:

Start Page > Special Functions > Special Programs

The screenshot shows the PowerSchool interface. On the left is a sidebar with 'Functions' and 'Setup' sections. The main area displays a table titled 'Enrolled Students: ESOL04-ESOL Svc >3 but <4 Years'. The table has columns for 'Students', 'Student Number', and 'Grade Level'. Below the table, there is a list of student names and their corresponding numbers and grade levels. To the right of the table, there is a form titled 'Edit Special Program Enrollment' for a specific student. The form includes fields for 'Comment', 'Entry Date' (set to 9/5/2016), 'Exit Date' (set to 5/25/2016), 'Exit Reason', 'Grade Level' (set to 12), and 'Program' (set to ESOL04-ESOL Svc >3 but <4 Years). A red arrow points to the 'Exit Date' field.

Students	Student Number	Grade Level
Alvarado, Andy B	8	12
Baker, Judy M	34	12
Baker, Cole	36	11
Barlow, Bruce F	37	10
Barlow, David S	38	12
Barlow, David	39	11
Baumgartner, Amber S	40	12
Bauer, Adam C	42	10
Bickel, Matthew E	43	11
Bickel, Kathryn B	63	11

- To mass close all students actively enrolled in special programs:

Start Page > System > DDE

Select [table 41] and view/print all students with Special Program enrollments via selection criteria: *Program ID = #*

Use DDA to "modify" Exit Date to the last day of the school year. Also, modify Exit Code to "EY"

Graduating students' special considerations :

Post-graduation transcripts

In the district setup, PowerSchool was provided the last grade in the district. The EOY uses this data to determine when students are ready to leave the district. For example, if the district's highest grade level is 12, then when students are promoted into grade level 12, it will set their Sched_NextYearGrade as 99 and their Next_School as 999999. Students entering the EOY with Sched_NextYearGrade as 99 and Next_School as 999999 are moved to Graduated Students.

It is a good check to :

1. verify that students with next grade = 99 have next school set to 999999 and
2. verify that students with next school set to 999999 have next grade set to 99

Student's class RANK (out of) field(s) are **not** carried forward after the EOY process moves graduated students to the "Graduated Students" School. Additionally, the name of the school from which the student graduated is replaced with a "Graduated School" identifier.

*One **immediate** and viable option for maintaining access to the RANK and School Name information for graduated students is to print and save/store the final transcripts for seniors after final GPA/RANK calculations. The .pdf transcripts may be re-printed as necessary.

Another option is to create custom fields for rank and other desired fields, export the final student data pre EOY processing, then import data into the students' Graduated School records post EOY processing.

Scholarship Requirements

In consideration of SC State Scholarship requirements, such as the Palmetto Fellows, student class rank information for additional grade levels must be stored as well.

Complete Scheduling & Commit the Schedule to the live Side.

If you use PowerScheduler to create your school schedule, commit the schedule to the live side once you have completed the build and/or load process and are satisfied with the schedule. The schedule is considered complete when all desired courses and sections are built (via the Build process or Copy Master Schedule function) and students are enrolled into those sections (via the Load process).

Note: The scheduling process in PowerScheduler may be continued after running the End of Year process, but certain extra steps must be taken as a workaround to ensure students are scheduled for the correct school and grade level. For more information, see Knowledgebase article [9687](#).

Copy Master Schedule on Live Side

If your school manually schedules students on the live side, you can use the Copy Master Schedule function before or after the End of Year process. Reference PowerSource Knowledgebase article [8272](#) for detailed instruction.

Other Scheduling Notes

Years & Terms - After committing your schedule, or copying the master schedule on the live side, remember to check the start and end dates for your Years & Terms at [Start Page > School Setup > Years & Terms](#). When committing the schedule from PowerScheduler, the scheduling term dates from PowerScheduler overwrite the Years & Terms dates on the live side. When copying the master schedule, the dates from the source year overwrite the Years & Terms dates for the upcoming (destination) school year. Incorrect dates in the Year term will cause incorrect student enrollment dates when running the End of Year Process.

Print Meal Transactions and PowerLunch Reports

When running the End of Year Process, PowerSchool rolls over each student's current balance (stored in [Students]Balance1) as the beginning balance (stored in [Students]Balance2) and clears all meal transactions from the [GLDetail] and [Batches] tables.

To preserve a copy of historical lunch data, export the records from the GLDetail table. This allows you to review individual lunch transactions after running End of Year without having to restore a PowerSchool backup.

It is also recommended that you print certain PowerLunch reports before closing out the school year. These reports are unavailable for any school year that has been closed out by the End of Year Process because all PowerLunch transactions are cleared. Use the following navigation to locate PowerLunch reports:

[Start Page > PowerLunch > Case Report](#)

[Start Page > PowerLunch > Meal Count Listing](#)

[Start Page > PowerLunch > Meal Count Report](#)

Export Historical Grades

While the End of Year Process does not modify or delete any stored grades, it is good practice to export this data at the end of each school year. Exporting these records provides your district with a snapshot of all grading data at the end of a given school year.

[Start Page > System Administrator > Export Historical Grades](#)

Performing the End of Year Process

Now that you have prepared your database for the End of Year Process, you must set up the End of Year function, perform a validation, fix any errors, and complete End of Year. The steps described should be completed in the order listed in the following checklist.

Performing End of Year Checklist

- ☐ **Address SC Specific End of Year Considerations**
 - Store final GPA/RANK/School Name data for graduating students
 - Store final GPA/RANK information for scholarship award purposes
 - Exit students from Special Program Enrollments
- ☐ **Backup PowerSchool – Pre-End of Year Backup**
- ☐ **Complete End of Year Setup (required)**
- ☐ **Default Next School (required)**
- ☐ **Exit Codes (required)**
- ☐ **Entry Codes (required)**
- ☐ **Exit Comments (required)**
- ☐ **Fee Transfer Method (required)**
- ☐ **Perform End of Year Validation (required)**
- ☐ **Review and Correct Errors (required)**
- ☐ **Perform End of Year Process (required)**
- ☐ **Verify Setup**
- ☐ **Confirmation (required)**
- ☐ **Start End of Year (required)**
- ☐ **Progress and Completion Message (required)**
- ☐ **Backup PowerSchool – Post-End of Year Backup**

Backup PowerSchool

Note: A separate backup is not required for PowerTeacher Gradebook. PowerTeacher Gradebook data is contained in the PowerSchool database as opposed to individual data files.

Backup and archive your PowerSchool database. During this phase, you will set up your database for End of Year, perform a validation, correct any validation errors, and then run the End of Year process. Any erroneous changes during this phase may be undone by reverting to a database backup.

Archive this backup in a safe location and label the backup appropriately indicating that End of Year preparation has been complete (per the steps in the ***Preparing for the End of Year Process*** section), but End of Year validation has not. **This is the pre-validation backup.**

End of Year Setup

This step is required.

In this section, you will set up the End of Year function with several settings that determine how students move from their current school enrollment to their upcoming school enrollment.

Default Next School

This step is required.

Validate that each school is setup with a valid Default Next School for Students in the High Grade. For example, a high school is typically setup with a default next school of 999999 (Graduated Students).

Use the following steps to set up a Default Next School value for each school:

1. Log into the District Office.
2. Navigate to **Start Page > System Administrator > End of Year Process**.
3. Review the Default Next School values for each school.
4. If any need to be corrected, update the default next school value at **Start Page > District Setup > Schools/School Info > Edit School**.

When the End of Year Process promotes a student, the student's Next School Indicator value is set to the school number of the student's upcoming school. However, if the student is going to be enrolled in the highest grade level for the upcoming school year, the student's Next School Indicator value will be set to the Default Next School value.

Example: A high school student moving from 9th grade to 10th grade is assigned a Next School Indicator for the high school because 10th grade is not the highest grade level in that high school. However, a student moving from 11th grade to 12th grade is assigned a Next School Indicator value of 999999 (Graduated Students School) if the high school was properly setup with a Default Next School value of 999999.

This step is required.

Enrollment Exit Codes

Select an Exit Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End of Year Process assigns these Exit Codes to each student's current enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Exit Codes used during the End of Year Process can be set on the End of Year Process page at [Start Page > System Administrator > End of Year Process](#). If your school requires new Exit Codes navigate to [Start Page > District Setup > Exit Codes > New](#).

Enrollment Entry Codes

This step is required.

Select an Entry Code for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End of Year Process assigns these Entry Codes to each student's new/upcoming enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Entry Codes used during the End of Year Process can be set on the End of Year Process page at [Start Page > System Administrator > End of Year Process](#). If your school requires new Entry Codes, navigate to [Start Page > District Setup > Entry Codes > New](#).

Enrollment Exit Comments

This step is required.

Select an Exit Comment for each type of student: Graduating, Promoted to next school, Promoted within same school, Retained, and Demoted. The End of Year Process assigns these Exit Comments to each student's current enrollment based on a comparison of the student's Next School Indicator, current school, Next Grade Level, and current grade level.

The Exit Comments used during the End of Year Process can be set on the End of Year Process page at [Start Page > System Administrator > End of Year Process](#).

Fee Transfer Method

This step is required.

Select a fee transfer method. Fee balances can either be zeroed out or rolled over. If the "Roll over the current balance" option is selected, any student with a non-zero fee balance for the current school year will be given a SOY (Start of Year) Balance in their fee transactions for the upcoming school year. If the "Zero the current balance" option is selected, students will start the upcoming school year with a zero balance for fee transactions.

Individual transaction details are not carried forward.

Note: This option does not affect student lunch balances in PowerLunch. PowerLunch balances are always rolled over to the upcoming school year.

End of Year Validation

This step is required.

The End of Year Process includes a validation mode, during which the system will evaluate student, school, and district information for End of Year readiness. Schools usually run the end of year process once to validate. Then, after any errors have been corrected, final backups made, etc., they run the actual EOY process. The End of Year Process will not run unless all students and schools are properly configured for new enrollments in the upcoming school year. To initiate the End of Year validation, please do the following:

1. Ensure that the box labeled "Check here to confirm that you really want to do this" is **not** checked.
2. Click the "Perform End of Year Processing" button to initiate the End of Year validation process.

Warning: If this box is checked, the End of Year Process is performed if the validation does not encounter any errors. Students will be promoted, graduated, or retained based on their assigned Next School Indicator and Next Year Grade.

During the validation process, PowerSchool checks each school and each student for End of Year readiness. Any validation errors are returned.

Review and Correct Errors

This step is required.

After running the End of Year Validation, correct any of the validation errors that appear. For an explanation of End of Year validation errors, please see the **Validation Error Messages** section in the Appendix. These error messages are also available in article [9500](#) on PowerSource.

After correcting any errors, run the End of Year Validation again as described in the previous section. It is common to perform the validation process and correct errors several times until all errors have been cleared.

Backup PowerSchool – Pre-End of Year Backup

Backup and archive your PowerSchool database. During this stage in the End of Year Process, you have completed the data validation and have corrected any validation errors.

Archive this backup in a safe location and label the backup appropriately indicating that End of Year validation has been complete and no more validation errors exist in your PowerSchool database. **This is the pre-End of Year backup.**

For detailed instructions on backing up PowerSchool Premier, please see the [Oracle Backup and Restore Guide](#) on PowerSource. PowerSchool End of Year Process

End of Year Process

This step is required.

Once all validation error messages have been corrected, you can perform the End of Year Process and close out the school year by navigating to **Start Page > System Administrator > End of Year Process**.

The End of Year process is performed at the District level, so all students in the district will be rolled over at the same time. This is an irreversible process.

Verify Setup

Earlier, when running the End of Year Validation, you selected various Entry Codes, Exit Codes, and exit comments to be assigned during the End of Year Process. Verify that these settings are still correct before proceeding with End of Year. These settings appear at the bottom of the End of Year page.

Confirmation

This step is required.

Check the box near the bottom of the screen to indicate you wish to run the End of Year Process. Earlier, you performed the End of Year Process without checking this box, indicating that you were performing an End of Year validation. Now that the box is checked, you will perform the End of Year Process and close out the school year.

Start End of Year

Click Perform End of Year Processing to start the End of Year Process. If you have cleared all validation error messages, PowerSchool will begin closing out the school year and creating new school enrollments for active students.

Please allow several hours for the process to complete. The process may take less than an hour, or run for several hours depending on the size of your district.

Progress and Completion Message

After starting the End of Year Process, PowerSchool will provide you with feedback on the progress of the End of Year Process.

Leave your browser on this page while the End of Year Process is running. This progress indicator will display several messages as shown in the following screen shot.

The End of Year Process is complete once you see the "End of Year Process Complete" message as seen above. You may not see this message if you allow the browser window to timeout. Check back periodically, or use the Server Log as shown below to monitor the progress of the End of Year Process.

Note: If you accidentally close your browser during the End of Year Process, or if your browser window "times out," you can monitor the End of Year Process progress on the PowerSchool server by viewing the server log.

To view the server log, select Log Window from the hidden PowerSchool menu on your PowerSchool server. You can also view the server log in your browser by navigating to [Start Page > System Administrator, System Logs > System Log > View Current System Log File](#).

Backup PowerSchool – Post-End of Year Backup

Backup and archive your PowerSchool database. During this stage in the End of Year Process, you have completed the End of Year Process and students are promoted to their upcoming school enrollments.

Archive this backup in a safe location and label the backup appropriately indicating

that the End of Year Process is complete. This is the **post-End of Year backup**.

For detailed instructions on backing up PowerSchool Premier, please see the [Oracle Backup and Restore Guide](#) on PowerSource.

After the End of Year Process

After the End of Year Process has been completed, there are a number of recommended tasks to perform before starting the upcoming school year. The tasks described in this section are not required since the End of Year Process has been completed. However, a thorough review of your school setup before the beginning of the upcoming school year will help ensure a successful transition into the next school year.

Post-End of Year Checklist

Use the following checklist to track your progress through the Post-End of Year tasks.

- ☐ **Years and Terms**
- ☐ **Periods**
- ☐ **Cycle Days**
- ☐ **Attendance Codes**
- ☐ **Attendance Code Categories**
- ☐ **Attendance Conversions**
- ☐ **Full Time Equivalencies (FTEs)**
- ☐ **Attendance Preferences**
- ☐ **Bell Scheduled**
- ☐ **School Calendars**
- ☐ **Reporting Segments**
- ☐ **Final Grade Setup**
- ☐ **Current Grade Display**
- ☐ **GPA Student Screens**
- ☐ **GPA Calculations**
- ☐ **Honor Roll Methods**
- ☐ **Final Grade Entry Options**
- ☐ **Import 10pt UGP Script (*NEW for 2016-17*)**
- ☐ **Activities**

Years and Terms

Verify the starting and ending dates of your Years & Terms for each school in your district by navigating to [Start Page > School Setup > Years & Terms](#).

Periods

Verify the number of periods and the period abbreviations for the new school year by navigating to [Start Page > School Setup > Periods](#).

To adjust the number of periods in a given school year:

1. Navigate to [Start Page > School Setup > Years & Terms](#).
2. Click the link in the Year column to modify the selected year. The Edit School Year page appears.
3. Select the number of Periods from the Periods menu.
4. Click **Submit**.

Cycle Days

Verify the number of cycle days and the cycle day abbreviations for the new school year by navigating to [Start Page > School Setup > Days](#).

To adjust the number of cycle days in a given school year:

1. Navigate to [Start Page > School Setup > Years & Terms](#).
2. Click the link in the Year column to modify the selected year. The Edit School Year page appears.
3. Select the number of Cycle Days from the Days menu.
4. Click **Submit**.

Attendance Codes

When creating the new Year term for a new school year, PowerSchool copies the attendance codes from the previous school year, eliminating the need to setup attendance codes each year from scratch. Verify the Attendance Codes setup for the upcoming school year. Ensure that the proper codes are designated as presences or absences and are properly counted in ADA.

[Start Page > School Setup > Attendance Codes](#)

Attendance Code Categories

Verify that the correct Attendance Code Categories are setup for the upcoming school year. Most schools use the Excused, Unexcused, and Tardy attendance code categories. Attendance codes must be associated with the Tardy attendance code category in order to be properly recognized as a tardy.

[Start Page > School Setup > Attendance Code Categories](#)

Attendance Conversions

Verify that each attendance conversion is correctly defined for each full time equivalency.

[Start Page > School Setup > Attendance Conversions](#)

Full Time Equivalencies

Verify that each Full Time Equivalency (FTE) is assigned a Default Attendance Mode and a Default Attendance Conversion.

[Start Page > School Setup > Full Time Equivalencies \(FTE\)](#)

Attendance Preferences

Verify that the attendance preferences are correctly setup for each school in your district. The attendance preferences determine which attendance recording methods are available, the default attendance page for recording student attendance in PowerSchool, the meeting/daily attendance bridge mode, attendance calculation accuracy, and more.

[Start Page > School Setup > Attendance Preferences](#)

Bell Schedules

Verify that the bell schedules for each school contain the correct number of periods and are associated to the correct Attendance Conversion Method. Only one bell schedule can be used per calendar day and the bell schedule determines which attendance conversion is used on a given day.

Verify that each period in each bell schedule has the correct start time, end time, and is set to count in (or to be excluded from) ADA calculations. If you use the Meeting/Daily attendance bridge, ensure that each bell schedule has one period assigned as the daily attendance bridge.

[Start Page > School Setup > Bell Schedules](#)

School Calendars

Verify that each day in your school calendar is properly configured with the correct cycle day, bell schedule, tracks, in-session indicator, membership value, and calendar day type. In-session days usually have a membership value of 1, whereas days not marked as in-session usually have a membership value of 0.

[Start Page > School Setup > Calendar Setup](#)

Reporting Segments

If your school uses Reporting Segments, ensure that they are updated with the correct dates for the upcoming school year.

Note: Do not update your Reporting Segments until reports have been completed for the school year.

[Start Page > School Setup > Reporting Segments](#)

Final Grade Setup

Ensure that your final grade reporting terms (store bins) are correctly set up for each scheduling term in your school year.

[Start Page > School Setup > Final Grade Setups](#)

Current Grade Display

Update various grade display settings for each school on the Current Grade Display page to determine which final grades to display on the Quick Lookup and whether to display current or historical grades. The value in the Current Grade field determines which final grade reporting term is used as the current grade throughout the current school. The value in the Parent/Student Access Term field determines the data displayed in the public portal. Enter an appropriate term abbreviation. Your term abbreviations may or may not coincide with your final grade store codes.

Start Page > School Setup > Current Grade Display

GPA Student Screens

Update various settings at each school on the GPA Student Screens page. Select a GPA calculation method from the pop-up menu to determine the GPA displayed at the bottom of the Quick Lookup student screen. Update any Data Access Tags (DATs) used for the Cumulative Info student screen. Some DATs on this page may have year or term-specific parameters that need to be updated every year or every term.

Start Page > School Setup > GPA Student Screens

GPA Calculations

If your district uses GPA calculations with year-specific parameters or query options, ensure that your GPA calculations are updated with new parameters that pertain to the current school year.

Start Page > District Setup > GPA Calculations

Honor Roll Methods

If your school's honor roll methods use year-specific GPA calculations, ensure that the honor roll methods at each school are updated to use GPA calculations that are setup for the current school year.

Start Page > School Setup > Honor Roll

Final Grade Entry Options

Review each school's Final Grade Entry Options to ensure that each is setup for the

upcoming school year. These settings help determine how grades may be entered via PowerTeacher Portal.

Start Page > School Setup > Final Grade Entry Options

Activities

Create any new activities that will be offered in the upcoming school year. When specifying the field name of a new activity, ensure that you are using supported characters for a custom field name. PowerSchool supports letters, numbers, and the underscore (_). While other characters may be accepted by the application when creating the new activity, they may prevent students from properly enrolling in the activity.

Start Page > School Setup > Activities Setup

Appendix

Validation Error Messages

The following error messages may appear when performing the End of Year Validation process. Refer to this section to identify a cause and solution for each error message.

Error Message

End of Year Process not completed. The following errors occurred:
Smith, John: *Next_School is blank*

Cause

The student named in this error message is not assigned a Next School Indicator.

Solution

Assign the student a Next School Indicator on the Scheduling Setup student screen. This value can be assigned for a group of students using the Next School Indicator group function.

Error Message

End of Year Process not completed. The following errors occurred:
Smith, John:

Next School is "High School" and next grade is 0, not 9 – 12

Cause

The student is assigned a Next Year Grade Level that is not taught at the student's Next School.

Solution

If the student is already assigned to the correct Next School, correct the student's Next Year Grade on the Scheduling Setup student screen. If the student is assigned to a correct Next Year Grade, you may need to correct the student's Next School Indicator on the Scheduling Setup student screen.

Error Message

End of Year Process not completed. The following errors occurred:
Smith, John:

Next_School (123456) is not a valid school in this district.

Next School is "High School" and next grade is 12, not 0 – 0

Cause

The student was assigned a Next School Indicator for a school number that doesn't exist in the District. The school name listed in the last line of this error message is the student's current school.

Solution

This issue is often caused by an improperly configured Next School Indicator at the student's current school. First, verify that the Next School Indicators at the student's current school are configured with a valid school number at [Start Page > School Setup > Next School](#).

Once the Next School Indicators have been corrected at the student's current school, select the student and assign a valid Next School Indicator on the Scheduling Setup student screen.

Error Message

End of Year Process not completed. The following errors occurred:
Smith, John:

Grade Level is 99 and Next School Indicator is not "Graduated Students"

Cause

A grade level of 99 is reserved for students in the Graduated Students School. If a student is assigned a Next Year Grade of 99, but is not assigned a Next School Indicator for the Graduated Students School (999999), the student will not be able to graduate.

Solution

If the student is supposed to graduate, set the student's Next School Indicator to the Graduated Students School on the Scheduling Setup student screen. If the student is not supposed to graduate, then correct the student's Next Year Grade on the Scheduling Setup student screen.

Error Message

End of Year Process not completed. The following errors occurred:
School 1 is not setup for next year.

Cause

A school is setup for next year only after the year term for the upcoming school year has been created at Start Page > School Setup > Years and Terms. For instance, if a district is running the End of Year Process to close out the 06-07 school year and a school does not have the 07-08 term setup at Start Page > School Setup > Years and Terms, the End of Year Process will not proceed and this error message will appear. PowerSchool uses the term dates for the upcoming school year to determine the entry dates and exit dates for each student's upcoming school enrollment.

Solution

Select the school that is not setup for next year and create the year term at [Start Page > School Setup > Years and Terms](#).

Error Message

End of Year Process not completed. The following errors occurred:
School 999999 is not setup for next year.

Cause

This error message may appear when other schools are improperly setup for next year.

Solution

There is no need to create any terms at the Graduated Students School in order to run the End of Year Process. Once all other schools have been properly setup with a year term for the upcoming school year, this error message should no longer be displayed when running the End of Year validation.

Error Message

You did not check the confirm checkbox. End of Year Process will not continue.

Cause

When running the End of Year Process, if the "Check here to confirm that you really want to do this" box was not checked, then the End of Year Process will not run. This error message is normal when running the End of Year validation process.

Solution

It is only necessary to check the "Check here to confirm that you really want to do this" box on the End of Year Process page if you are ready to run the End of Year Process.

Other Resources

End of Year Frequently Asked Questions
Rerunning the End of Year Process
How to determine when End of Year was last performed
What does the End of Year Process do?
Student grade levels and the End-of-Year process (Promoted, Graduated, or Retained?)
Latest End of Year Documents on PowerSource